Corporate Contract Readiness Checklist

This checklist is designed to help businesses assess their readiness to pursue corporate and enterprise contracting opportunities. Completion of all sections does not guarantee vendor approval or contract award but indicates foundational preparedness for corporate procurement processes.

SECTION 1 — Business & Operations

☐ Corporate entity active and compliant

☐ Insurance coverage meets enterprise thresholds

☐ Financial statements available

☐ Banking relationships established

SECTION 2 — Vendor Onboarding Readiness

☐ Corporate supplier profiles drafted

☐ W-9 prepared

☐ Insurance COIs available

☐ Cyber/security policies (if applicable)

☐ ESG/DEI disclosures prepared (if required)

SECTION 3 — Supplier Diversity (If Applicable)

☐ Diversity certification eligibility assessed

☐ Corporate diversity portals identified

☐ Tier I/Tier II positioning understood

☐ Reporting capability assessed

Note: Supplier diversity participation is optional and varies by corporation, industry, and spend category.

SECTION 4 — Capability & Differentiation

☐ Capability overview prepared

☐ Spec sheets or service descriptions finalized

☐ Capacity and scalability assessed

☐ Pricing structure defined

SECTION 5 — RFP & RFQ Readiness

☐ Corporate RFP process understood

☐ Pricing strategy aligned to market

☐ Internal review workflow established

☐ Legal review resource identified (external)

SECTION 6 — Contract & Risk Awareness

☐ Contract terms awareness (indemnity, insurance, SLAs)

☐ Payment terms understood

☐ Change management process identified

☐ Termination, renewal, and audit rights awareness

☐ Data privacy or confidentiality obligations identified (if applicable)

SECTION 7 — Systems & Tracking

☐ Vendor portal tracking process

☐ Opportunity tracking system

☐ Document repository

☐ CRM or dashboard in place

SECTION 8 — Growth Readiness

☐ Strategic target accounts identified

☐ Partnering/subcontract strategy considered

☐ Expansion readiness assessed

☐ Bid/no-bid criteria established

Next Step:

If multiple items remain incomplete, a structured readiness or vendor onboarding plan can help prioritize actions, reduce risk, and improve approval and award outcomes.